

Office of Financial Aid

Instructions for Completing the Soka International Student Financial Aid Application

This form should be completed by international non-U.S. undergraduate resident students applying to Soka University, for classes beginning in the Fall of 2019, who are applying for any type of financial aid.

You must submit your completed application, along with all required supporting documents, via mail or in-person, by the following deadline!

Application Submission Deadlines

Incoming (First-Year) Students: **February 15, 2019**

Continuing Students: **March 2, 2019**

- **Collect the following documentation to assist with completing this application:**
 - **Tax Returns and Income Documentation:**
 - **Non-U.S. tax returns** – Must show ‘Total Income’ and ‘Total Tax Assessed’ amounts.
 - **U.S. tax returns** – This includes tax transcripts, IRS Form 1040NR, or IRS Form 1040.
 - **For non-tax return filers** – Income documentation that shows ‘Total Income’.
 - **NOTE:** ‘Income’ and ‘Tax Assessed’ figures should include the entire 12-month “2017 tax period”. The United States 2017 tax period is January 1, 2017 to December 31, 2017. If you or your parents filed taxes in a country that uses a “fiscal” tax period (such as July 1, 2016 to June 30, 2017), use/submit income and tax documents for **both** the 2016-2017 and 2017-2018 fiscal years; to include **all** 2017 income.
 - **Bank, Brokerage, and Investment Account Statements.** Do not include “retirement” accounts.
 - **Investment Real Estate or Business(es) owned by you or your parents.**
 - **Grant and Scholarship Documentation**
 - **Any other miscellaneous funds earned by, or paid to, you or your parents.**
- All non-English language documents must be submitted in English-translated form and include an official translation certification form.
- All monetary values must be submitted in both their local currency value and US dollar conversion value.
- You must complete **all** application sections. Do not leave any question or amount response blank. If a question does not apply, write “**N/A**” (for Not Applicable) where a response is requested, or enter a “**0**” if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.
- Submit additional sheets along with this application if more room is required to answer any question.
- Do not submit this cover page along with your application.
- Students previously admitted to SUA should include their seven-digit “SUA Student ID#” on this form. First-time SUA applicants will not have an SUA ID# and should leave this field blank.
- **NOTE: Soka University of America may request additional supporting documentation for any information or monetary figure submitted on this form.**

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Please use the appropriate conversion rate listed below when calculating all non-U.S. dollar monetary values in this application. Use this same currency rate when having your financial documents professionally translated. If you do not see your country listed, please contact the Soka Office of Financial Aid for the proper conversion rate. The Soka Office of Financial Aid reserves the right to **not** accept documents that use different conversion rates.

Country	Currency	USD	Exchange Rate	Country	Currency	USD	Exchange Rate
Afghanistan	AFN	\$1	75.4851	Myanmar	MMK	\$1	1557.18
Albania	ALL	\$1	109.136	Nepal	NPR	\$1	117.709
Argentina	ARS	\$1	39.6553	Netherlands	EUR	\$1	0.864051
Australia	AUD	\$1	1.38453	New Zealand	NZD	\$1	1.51212
Bangladesh	BDT	\$1	83.791	Nigeria	NGN	\$1	364.423
Bosnia and Herzegovina	BAM	\$1	1.68945	Pakistan	PKR	\$1	123.429
Brazil	BRL	\$1	4.01568	Peru	PEN	\$1	3.30772
Bulgaria	BGN	\$1	1.68962	Philippines	PHP	\$1	54.1633
Cambodia	KHR	\$1	4114.12	Poland	PLN	\$1	3.70279
Cameroon	XAF	\$1	566.674	Russia	RUB	\$1	65.2638
Canada	CAD	\$1	1.27997	Rwanda	RWF	\$1	867.538
China	CNY	\$1	6.86978	South Africa	ZAR	\$1	14.2022
Congo (Kinshasa)	CDF	\$1	1619.09	South Korea	KRW	\$1	1112.1
Denmark	DKK	\$1	6.4422	Spain	EUR	\$1	0.864051
Egypt	EGP	\$1	17.9107	Sri Lanka	LKR	\$1	169.139
Ethiopia	ETB	\$1	27.933	Sweden	SEK	\$1	8.95523
France	EUR	\$1	0.864051	Switzerland	CHF	\$1	0.984347
Georgia	GEL	\$1	2.6108	Taiwan	TWD	\$1	30.5648
Germany	EUR	\$1	0.864051	Tajikistan	TJS	\$1	9.4191
Ghana	GHS	\$1	4.97974	Thailand	THB	\$1	32.2773
India	INR	\$1	73.2023	The Gambia	GMD	\$1	49.2141
Indonesia	IDR	\$1	14954.36	Tunisia	TND	\$1	2.81012
Italy	EUR	\$1	0.864051	Turkey	TRY	\$1	5.94832
Japan	JPY	\$1	113.974	Uganda	UGX	\$1	3815.76
Kenya	KES	\$1	100.892	Ukraine	UAH	\$1	28.2746
Liberia	LRD	\$1	115.511	United Arab Emirates	AED	\$1	3.6725
Malawi	MWK	\$1	727.165	United Kingdom	GBP	\$1	0.767165
Malaysia	MYR	\$1	4.14084	Vietnam	VND	\$1	23331.35
Mexico	MXN	\$1	18.6846	Zambia	ZMW	\$1	12.2516
Mongolia	MNT	\$1	2547.75	Zimbabwe	ZWD	\$1	361.9
Morocco	MAD	\$1	9.44338				

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Name (Last, First, MI): _____ SUA Student ID#: _____

SECTION A: DEMOGRAPHIC INFORMATION

Complete **all** application sections and fields leaving no question or amount response blank. If a question does not apply, write "**N/A**" (Not Applicable) where a response is requested, or "**0**" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.

PART A1: STUDENT INFORMATION

Name (Last, First, MI): _____ SUA Student ID#: _____

Phone Number: _____ Date of Birth: _____

*Country of Citizenship: _____ Email Address: _____

** NOTE: If you are a US citizen or a permanent resident, STOP HERE. You **must** apply to SUA as a Domestic Student.*

Marital Status: ☐ Single ☐ Married ☐ **Separated ☐ **Divorced ☐ Widowed

** Date of Separation (if Separated or Divorced): _____

PART A2: PARENT INFORMATION

NOTE!: If you (the student) were born before January 1, 1996, or are legally married, you are an "independent" student and may skip all parental information questions on this entire form.

The term "*Parent*" refers to a biological or adoptive parent. If your parents are married, give the information for both parents, even if one is not working. If you live with one parent who has re-married, give the information for both your biological parent and your step-parent.

Parent 1 Name: _____

Parent 2 Name: _____

Parents' Current Marital Status:

☐ Single ☐ Married ☐ Re-Married ☐ **Separated ☐ **Divorced ☐ Widowed

*Date of Separation (if Separated or Divorced): _____

Dislocated Workers/Displaced Homemakers

As of today, are either of your parents a "dislocated worker" or "displaced homemaker?" ☐ Yes ☐ No

(A person is considered "dislocated" if he/she meets one of the following conditions: (a) has lost his/her job, (b) has been laid off, (c) is receiving unemployment benefits due to layoff, (d) was self-employed, but is now unemployed due to economic conditions or natural disasters.) (Verification documentation may be requested.)

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PART A3: FAMILY INFORMATION

List the people in your parent(s)' household. Please include:

- Yourself and your parent(s) (including stepparent), even if you do not live with your parents
- Your parent(s)' other dependent children, even if they do not live with your parent(s). List only family members whom your parent(s) provide more than half of their support **OR**, family members that would be required to provide your parent(s)' information when applying for student aid. Do not include foster children.
- Other members; only if: (a) they live with your parent(s), **AND** (b) your parent(s) provide more than half of their support, **AND** (c) they will continue to provide support from July 1, 2019 through June 30, 2020.
- College information for any household member that: (a) will enroll in college at least half-time during the 2019-2020 academic year, **AND** (b) was born on or after January 1, 1996, **AND** (c) will be enrolled in an undergraduate degree, diploma, or certificate.

Full Name of Household Member	Relationship to Student	Born on or after January 1, 1996	For family members born on or after January 1, 1996 who will enroll at least half-time in college in 2019-2020*		
			Name of College	Type of Degree	Year in College for 2019-2020
	Self	XXXX	Soka University		
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			

* Verification of college enrollment may be requested from you at a later date. Please note that we will not consider college enrollment for: (a) parents, (b) foster children, or (c) family members attending a foreign college, a military school, a non-financial aid recipient college, or those enrolled in graduate/professional schools.

If any member of your household (listed in the previous table) is not a parent or brother/sister, please explain how and why your family is financially supporting this person:

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SECTION B: INCOME AND TAX INFORMATION

Complete **all** application sections and fields leaving no question or amount response blank. If a question does not apply, write "**N/A**" (Not Applicable) where a response is requested, or "**0**" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.

PART B1: NON-U.S. TAX RETURN FILERS

Answer the following questions regarding non-U.S. tax return filings for non-U.S. income earned or gained.

2017 Non-U.S. Tax Return Filer Information			
	STUDENT	PARENT 1	PARENT 2
Check the box for any person that filed a <u>non-U.S. tax return</u> for the 2017 tax year. If your home country is on a fiscal year, and not on a calendar tax year, use both the 2016-2017 and 2017-2018 tax years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR ALL PERSONS WITH BOXES CHECKED IN THE QUESTION ABOVE: <ol style="list-style-type: none"> 1. Attach all original tax documents. Include a signed, translated, notarized copy for each tax document. 2. Tax document submissions must have all monetary figures converted to U.S. dollars using the currency conversion rates listed in the chart on Page 2. Currency conversion information (symbol, rate, & date) must be clearly stated. 			

PART B2: TAX RETURN NON-FILERS

2017 Tax Return Non-Filer Information	For each person listed below, check one box for EITHER Question 1 or Question 2, but not both.		
	STUDENT	PARENT 1	PARENT 2
1) Check the box for any person that <u>did not</u> earn ANY income in 2017.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Check the box for any person that <u>did</u> earn income in 2017, and <u>was not</u> required to file a 2017 tax return.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR ALL PERSONS WITH BOXES CHECKED FOR QUESTION #2 ABOVE: <p>If they worked <u>in</u> the U.S.: Attach IRS Form W-2 for all sources of income. For any sources of income for which they do not have an IRS Form W-2, please attach a signed statement listing these sources of income, the amounts earned from each source, and an explanation of why they are unable to provide a W-2 form.</p> <p>If they worked <u>outside</u> of the U.S.: Attach income statement forms for all sources of income. For any sources of income for which they do not have an official statement of income, please attach a signed statement listing these sources of income, the amounts earned from each source, and an explanation of why they are unable to provide an official statement of income form. Provide monetary values in both U.S. dollars and local currency amounts using the currency conversion information from the chart on Page 2.</p>			

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PART B3: U.S. IRS 1040NR TAX RETURN FILERS

2017 U.S. IRS 1040NR Tax Filer Information			
	STUDENT	PARENT 1	PARENT 2
Check the box for any person that <u>filed</u> , or <u>will file</u> , a U.S. IRS 1040NR tax return (U.S. Non-Resident Alien Income) for 2017.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR ALL PERSONS WITH BOXES CHECKED FOR THE QUESTION ABOVE: Attach an official copy of any completed tax form, or an official tax transcript, and submit with this application.			

PART B4: TOTAL INCOME & TOTAL TAX ASSESSED

Enter the 'Total Income' & 'Total Tax Assessed' values into the table below by adding the figures obtained from forms gathered in sections PART B1, PART B2, and PART B3.

The figures entered below should represent income totals, regardless of income origin.

Be sure to list totals in both 'Home Currency' and 'U.S. Dollars' using the currency conversion chart on **Page 2**. If income was earned in the U.S., enter "N/A" in the 'Home Currency' column.

2017 Total Income & Total Tax Assessed Information					
List the following totals for any person who earned any income in 2017 (*see NOTE below)		Home Currency	U.S. Dollars	FOR STAFF USE ONLY (Home/US)	
STUDENT	Total Income				
	Total Tax Assessed				
PARENT 1	Total Income				
	Total Tax Assessed				
PARENT 2	Total Income				
	Total Tax Assessed				

*** NOTE:** 'Income' and 'Tax Assessed' figures should include the entire 12-month "2017 tax period". The United States 2017 tax period is January 1, 2017 to December 31, 2017. If you or your parents filed taxes in a country that uses a "fiscal" tax period (such as July 1, 2016 to June 30, 2017), use/submit income and tax documents for both the 2016-2017 and 2017-2018 fiscal years; to include **all** 2017 income.

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PART B5: UNTAXED INCOME INFORMATION

2017 Untaxed Additional Income Information	STUDENT	PARENT(S)
	Totals from 1/1/17 to 12/31/17 (U.S. dollars)	
List the 'Total Child Support' received for any of your children. Do not include foster children.		
List the total of housing, food, and other living allowances paid to any members of the military, clergy, or others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.		
List the total of any other money you or your parents received on your behalf that is not reported elsewhere on this form. (e.g., bills paid for you, etc.)		

PART B6: ADDITIONAL FINANCIAL INFORMATION

2017 Additional Financial Information				
List the 'Total Child Support' paid out because of divorce or separation. Do not include support for family members listed in the table located in the PART A3: FAMILY INFORMATION section of this form.				
Full Name of Person Who Paid Child Support	Full Name of Child for Whom Support was Paid	Age of Child	Full Name of Person to Whom Support was Paid	Total Paid

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Name (Last, First, MI): _____ SUA Student ID#: _____

SECTION C: BANK ACCOUNTS, INVESTMENTS, & ASSETS

Complete **all** application sections and fields leaving no question or amount response blank. If a question does not apply, write "**N/A**" (Not Applicable) where a response is requested, or "**0**" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.

Please provide information for all accounts and assets held by you and/or your parents.

Calculate 'Home Currency' and/or 'U.S. Dollar' balances using the currency conversion chart on **Page 2**.

PART C1: ACCOUNT BALANCES AND NET WORTH

List total account balance information for yourself and your parents, as of this application date.

Be sure to check the appropriate box for any person who does NOT hold an account.

IMPORTANT NOTE: SUA may request copies of statements for verification of balances for any account listed.

Accounts to include: Bank accounts (checking, savings, etc.), Brokerage (investment) accounts, Trust funds, UGMA and UTMA accounts, Money market funds, Mutual funds, Certificates of deposit, Stocks, Stock options, Bonds, Other securities, Installment and Land sale contracts, Commodities, etc. Include the value of all qualified education accounts such as Coverdell savings accounts, 529 college savings plans, and Refund values of 529 pre-paid tuition plans.

Accounts to exclude: Life insurance policies, Designated retirement plans (e.g., 401k, 403b, Pension funds, Annuities, Non-education IRAs, etc.)

Bank (Checking & Savings) and Brokerage (Investment) Account Balance Information					
Provide the TOTAL BALANCE for each account, from every domestic or international institution you are with. Figures entered below should represent account balances as of the date of this application.					
Owner	Account Type (Bank, Brokerage, etc.)	Home Currency Balance	U.S. Dollars Balance	Check if this person has no accounts.	FOR STAFF USE ONLY (Home/US)
STUDENT				<input type="checkbox"/>	
STUDENT					
STUDENT					
STUDENT					
PARENT 1				<input type="checkbox"/>	
PARENT 1					
PARENT 1					
PARENT 1					
PARENT 2				<input type="checkbox"/>	
PARENT 2					
PARENT 2					
PARENT 2					

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PART C2: INVESTMENT REAL ESTATE

Provide details for all investment real estate held by you or your parents. Attach additional sheets if needed.

These properties include: Real estate other than your primary residence, Rental property, Mobile homes, Condos, Duplexes, Land, Summer homes, etc. **NOTE: Do not include a "primary residence" (i.e., a home that you primarily reside in).**

Investment Real Estate Information			
PROPERTY #1			
Property Address			
Held By	<input type="checkbox"/> Student	<input type="checkbox"/> Parent	
Original Purchase Price (USD)	Current Market Value (USD)	Current Mortgage Loan Balance (USD)	

PART C3: BUSINESS INFORMATION

Provide information for any businesses or investment farms owned by you or your parents.

Do not include businesses with 100 or fewer full-time employees, or designated "family farms".

Documents will be sent to you requesting further information. Attach additional sheets if needed.

Business or Investment Farm Information				
BUSINESS #1				
Business Address				
Business Name & Nature				
Held By	<input type="checkbox"/> Student	<input type="checkbox"/> Parent	Percent of Ownership Interest	
Business Market Value (USD) (100% value, not % of ownership)	Business Debt (USD) (100% debt amount, not % of ownership)		Number of Full-time Employees	

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SECTION D: OUTSIDE FUNDING

Complete **all** application sections and fields leaving no question or amount response blank. If a question does not apply, write "**N/A**" (Not Applicable) where a response is requested, or "**0**" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.

List **ANY** outside funding paid, or that will be paid, directly to you for the upcoming 2019-2020 academic year in the form of a scholarship, grant, or loan.

For each item listed below, submit documentation providing details for the funding.

IMPORTANT NOTE: If you receive notification of **ANY** additional Outside Funding after submitting this application, you are required to immediately notify the SUA Office of Financial Aid.

2019-2020 School Year - Outside Funding Information		
Name and Source of Funding	Type of Funding	Amount of Funding (U.S. dollars)
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	

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SECTION E: SUBMISSION INFORMATION

1) If you are a current Soka student, or an admitted Soka applicant, please review all "To Do List" items for incomplete items or missing documents at:

<http://learn.soka.edu>

- Locate the **"To Do List"** section on the right of the screen.
- Click the **'more'** link to display an extended list of your To Do List items.
- Incomplete documents will display with a status of **"Initiated"** or **"Notified"**.

2) Return this completed form to the Soka University Office of Financial Aid.

Please mail this form, or deliver this form in-person, along with include any supporting documents.

If you choose to submit information via email, SUA will not be responsible for any data security breach, and we may still request that you submit original documents.

<p>Applications can be mailed or delivered in-person to: Soka University of America Office of Financial Aid Founders Hall, Room 216 1 University Drive Aliso Viejo, CA 92656 USA</p>	<p>Website: www.soka.edu/financialaid Email: financialaid@soka.edu Phone: (949) 480-4342</p>
<p><small>This form requires handwritten signatures. Photocopies of handwritten signatures are permitted. Electronic, or typed, signatures will not be accepted, or updated</small></p>	

For more information, please visit our website at: www.soka.edu/financialaid

SECTION F: SIGNATURE(S)

By signing this form, we certify that all the information reported on this application is complete and accurate to the best of our knowledge. Some information may be an estimate and will be confirmed and/or updated by the submission of verification documents (i.e., tax returns, bank statements, etc.) I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and that I may be subject to a fine. (If you were born before January 1, 1996; your parents do not need to sign this form.)

Student Name (print)

Student Signature

Date

Parent Name (print)

Parent Signature

Date

(This form requires handwritten signatures. Photocopies of handwritten signatures are permitted. Electronic, or typed, signatures will not be accepted.)